

Informal Marketing/Sales Events



Informal marketing/sales events are conducted with a less structured presentation or in a less formal environment. They typically utilize a table, kiosk or a recreational vehicle (RV) that is manned by a plan sponsor representative who can discuss the merits of the plan's products.

Agents Must

1. Complete and pass the Events Basic module. Pay close attention to the things you are required to state aloud during your event.
2. Report all marketing/sales events to UnitedHealthcare according to event reporting policies and procedures.
3. Announce or post signage as to the plan types that will be promoted at informal marketing/sales events.
4. Agents must only promote plans they are certified to sell.
5. Host the event at a public venue.
6. Greet consumers with a general "Hello" or "Good morning/afternoon."
7. Have enrollment kits on-hand. This ensures you will have the required materials available for explaining the plan accurately to a consumer.

Agents Must Not

1. Advertise the events as an educational event.
2. Offer a meal or individuals snacks that could be "bundled" as a meal.
3. Provide gift cards, gift certificates, or cash as giveaways.
4. Conduct health screenings or other like activities.
5. Request or accept a referral.
6. Solicit consumers for personal/individual marketing/sales appointments under the premise that the appointment is for education purposes.
7. Restrict event admission to an exclusive organization membership list or specific social group.
8. Approach consumers.
9. Fail to be present or have a plan representative present at any event filed and not cancelled in bConnected at least three business days prior to the date of the event.
10. Move or relocate a kiosk or table from the location for which the event is filed.
11. Gesture, "call over," or proactively approach consumers.
12. Describe a catalog benefit, emergency call benefit, or giveaways in a manner that may be perceived as an enticement to enroll or confuse the member regarding enrollment with the Medicare Advantage plan.
13. Leave an event prior to the reported end time.
14. Cross-sell by promoting or displaying materials for non-health related products at marketing/sales events.